

Put AI to work for your credit union, starting with **your people.**

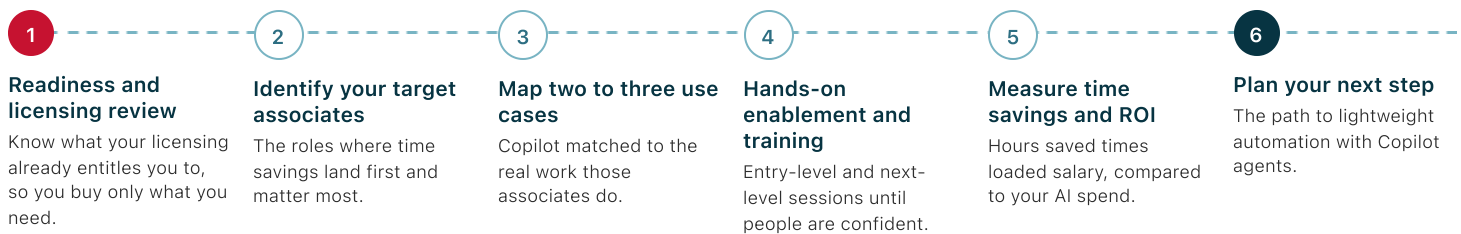
Most credit unions know AI matters but aren't sure where it fits, or whether it's safe. We start where your data and work already exist in the Microsoft 365 ecosystem, giving your associates secure, governed Microsoft Copilot capabilities and the enablement to hand hours back every week.

CRAWL, WALK, RUN — IN THAT ORDER

The clearest, most provable win is associate productivity. Your team already lives in Microsoft 365. Copilot puts AI inside the tools they use every day, at a fixed and predictable cost, with a return you can actually measure.

HOW IT WORKS

From first look to measured return.



WHERE IT HELPS

Real work, done faster, by the people already doing it.

Policy creation and updates	Contract and vendor review	Member communications
Data analysis and reporting	Meetings and follow-ups	Everyday writing and research

WHAT'S INCLUDED

Everything in the engagement.

Copilot and licensing readiness review A clear read on your Microsoft 365 environment, what your licensing already covers, and what it would take to turn Copilot on the right way.	Use-case mapping Two to three high-value use cases matched to the associates and functions where they will make the biggest difference.	Entry and next-level training Live, role-based sessions that take your team from first login to confident daily use, with quick-reference guides they keep.
Time-savings and ROI measurement A before-and-after look at the work, turned into an ROI you can put in front of leadership and the board.	AI usage guidance for a regulated environment Practical acceptable-use and governance guidance built for a credit union, so member data and compliance stay protected.	A roadmap for what's next A grounded plan for the walk-and-run phases, including lightweight process automation with Copilot agents when you are ready.

Microsoft 365 and Copilot license costs are billed separately through Microsoft. Scope, timeline, and pricing for each phase are confirmed on your assessment call.

START HERE

Start with a readiness assessment.

A short conversation on where Copilot fits your credit union, what your licensing already covers, and where the first hours of savings will come from. Backed by our 30-Day Satisfaction Guarantee.

704-790-4440

katalystng.com/lp-ai-credit-unions